

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 13, 2021



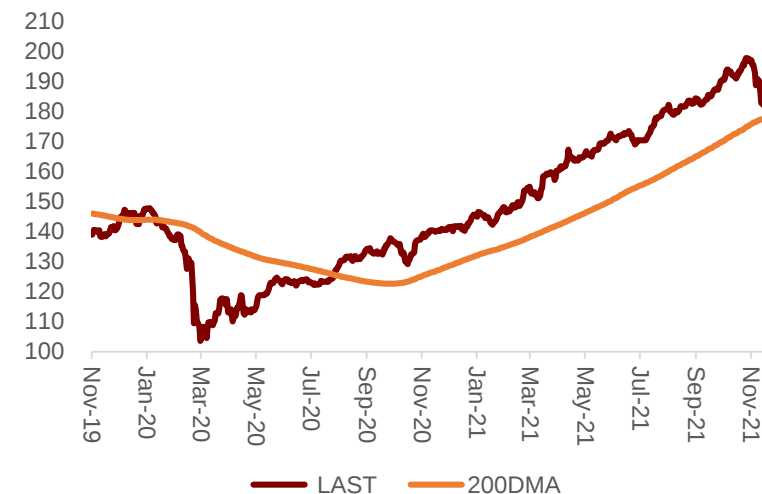


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD		PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,019.86	0.46	0.74	2.40	-4.14	26.82	9,739 SAR	2.56	17.70
Qatar (QE Index)	11,660.08	0.31	0.11	2.16	1.28	11.46	593 QAR	1.65	15.88
Dubai (DFMGI)	3,246.58	0.47	0.02	5.01	13.40	29.49	326 AED	1.62	24.42
Abu Dhabi (ADI)	8,935.16	-0.40	0.09	4.03	15.49	76.23	1,533 AED	1.88	16.35
Bahrain (BAX)	1,783.31	-0.17	-0.09	3.15	4.60	19.75	18 BHD	1.51	9.91
MUSCAT SE INDEX	4,006.64	0.49	0.41	0.61	2.08	10.00	5 OMR	0.86	13.25
SP GCC Comp LMC	186.84	0.23	0.42	2.54	0.69	32.77			
Developed Markets									
MSCI World Index	3,162.00	-0.82	-0.82	1.94	5.17	17.54			
U.S. (S&P 500)	4,668.97	0.33	-0.91	2.23	8.39	24.30			
U.K. (FTSE 100)	7,231.44	-0.83	-0.83	2.44	2.05	11.93			
Japan (Topix)	1,973.81	-0.22	-0.08	2.36	-2.78	9.37			
Emerging Markets									
MSCI EM Index	1,230.61	-0.64	-0.64	1.50	-1.79	-4.70			
China (SSE Composite)	3,655.86	-0.69	-0.27	2.59	2.47	5.28			
India (Sensex)	58,166.64	-0.20	-1.05	1.93	-1.62	21.81			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,013.53	-0.23	-0.52	3.17	2.05	26.31	41.64 KWD	2.08	25.75
Kuwait Premier Index	7,593.12	-0.29	-0.59	3.29	1.21	25.38	31.11 KWD	2.24	26.20
Kuwait Main Index	5,893.85	-0.05	-0.40	2.70	4.54	29.02	10.53 KWD	1.60	24.52
NIC 50	8,852.99	0.44	-0.64	3.21	1.14	25.38	28.60 KWD	2.22	25.20
Kuwait Sector									
Banking	1,606.25	-0.22	-0.54	2.99	1.79	27.08	23.91 KWD	1.25	27.20
Telecom	1,086.70	-0.12	-0.72	2.84	-0.89	-1.49	3.33 KWD	0.93	15.00
Industrials	1,148.94	0.03	-0.45	2.51	-1.74	28.69	4.08 KWD	0.90	13.83
Financial services	1,425.57	-0.13	-0.26	4.93	7.37	52.32	3.65 KWD	0.88	11.88
Real estate	1,338.48	-0.29	-0.31	3.66	4.75	40.68	2.89 KWD	0.76	54.60
Basic materials	1,030.86	-1.15	0.07	5.50	-4.49	15.72	0.92 KWD	1.87	27.21
Health care	806.34	0.01	-0.03	-0.33	1.31	-2.46	0.40 KWD	6.21	11.96
Consumer services	742.02	0.28	-0.28	0.84	-5.69	-0.99	0.69 KWD	0.88	15.67
Insurance	1,511.89	-3.52	-4.55	-5.43	3.71	30.07	0.63 KWD	0.79	8.52
Consumer Disc	1,340.25	0.35	-0.91	9.68	19.40	62.95	0.23 KWD	1.36	9.08
Energy	1,481.55	1.11	0.73	7.22	8.04	16.45	0.31 KWD	1.03	15.06
Technology	749.33	0.00	3.00	0.98	4.89	49.06	0.01 KWD	0.89	0.00
Utilities	605.26	-0.43	-0.86	-0.86	-2.95	-16.97	0.25 KWD	4.08	19.54

S&P GCC Composite LargeMidCap Index



What Move the GCC markets ,

Oil Prices

Oil prices rose on Monday, extending gains from last Friday, helped by growing optimism that the omicron coronavirus variant's impact will be limited on global economic growth and fuel demand, Brent futures climbed 53 cents, or 0.7%, to \$75.68 a barrel.

Kuwait Market

The market closed today down by - 0.23%, value traded 46.6 million KD, Premier market value traded reached 23.8 million KD and closed at 7,593.12 down by - 0.29%.

Saudi Market

The Market closed up by + 0.46 %, with positive macroeconomic sentiments bounce of oil reaching \$75.68.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



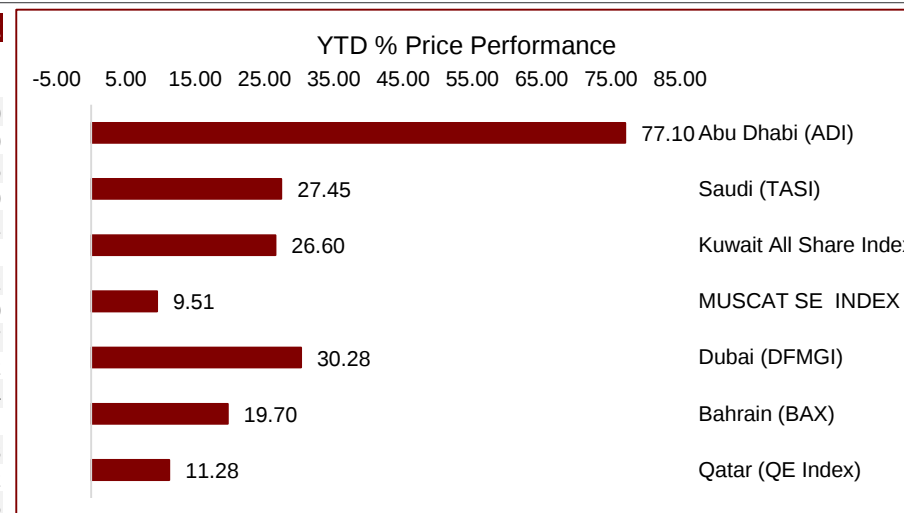
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.987	0.10	0.00	0.61	3.88	23.75	7.10 KWD	1.83	27.00
KFH	0.832	-0.24	-0.12	5.30	1.46	35.51	7.02 KWD	3.23	32.00
Zain	0.593	-0.50	-0.83	4.39	-0.83	-1.98	2.57 KWD	2.16	13.65
BOUBYAN BANK	0.792	-0.38	0.00	4.49	3.13	46.41	2.52 KWD	3.59	34.00
Agility	0.946	0.21	0.42	3.04	-3.55	54.59	2.11 KWD	0.97	2.01
Saudi Arabia									
ARAMCO	34.85	0.14	0.43	0.72	-3.06	-0.29	6,960.56 SAR	6.51	21.02
SABIC	111.20	1.46	3.87	4.07	-11.62	11.05	328.83 SAR	1.89	35.00
STC	109.60	2.43	-0.73	-1.62	-14.02	3.02	214.02 SAR	3.12	19.47
AL-RAJHI BANK	136.20	1.04	1.63	3.63	11.75	86.14	337.03 SAR	5.30	24.32
NCB	61.60	-0.96	-0.16	2.81	1.14	43.25	278.55 SAR	1.73	18.04
United Arab Emirates									
ETISALAT.AD	36.00	0.56	2.92	12.71	49.88	113.02	311.35 AED	6.76	33.73
FAB.AD	20.02	-2.34	-0.99	4.38	12.60	55.19	223.86 AED	2.05	18.42
EMIRATES NBD	13.90	0.36	0.00	5.30	-2.11	34.95	87.48 AED	1.02	10.96
DB ISLAMIC BK	5.48	0.92	1.48	6.20	10.71	18.87	39.32 AED	1.03	14.48
EMAAR PROPERT	4.99	1.84	2.05	6.40	22.30	41.36	40.08 AED	0.61	12.72
Qatar									
QNB	19.99	-0.05	-0.90	2.32	3.60	11.27	184.64 QAR	1.84	15.69
INDUSTRIES QAT	15.18	0.20	-0.27	3.37	-2.85	38.09	91.84 QAR	2.46	13.76
QA ISLAMIC BK	18.10	0.56	0.39	4.94	-1.10	5.49	42.77 QAR	1.79	13.42
MASRAF AL RAYA	4.82	0.12	-0.74	-0.74	7.48	6.27	44.83 QAR	2.44	16.21
MESAIEED PETRO	2.18	1.11	0.74	4.81	-3.41	6.50	27.39 QAR	1.64	16.52
OMAN									
BANK MUSCAT	0.496	0.81	0.40	4.64	10.22	37.78	1.77 OMR	0.84	8.33
OMANTEL	0.700	-0.57	-1.13	0.00	-5.41	-3.31	0.53 OMR	0.94	7.69
BANK DHOFAR	0.125	0.00	0.81	-2.34	6.84	28.87	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.188	1.08	1.62	-2.08	1.62	17.50	0.31 QAR	0.55	12.71
OMINVEST	0.308	0.65	0.65	-0.65	-1.91	-8.88	0.25 QAR	0.89	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-Dec-21	20.92%	11.76%	0.06%	0.30%	0.41%	4.62%	2.75%	10.54%	5.30%	4.38%
8-Dec-21	20.81%	11.83%	0.06%	0.27%	0.41%	4.53%	2.72%	10.35%	5.29%	4.37%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.23 % The leading sector bottom performance indices today are Insurance -3.52 % Basic materials -1.15 % Real estate -0.29 % respectively

Telecommunication sector are down today by -0.12 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -28.02 %

KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC have positive performance today by + 1.46 %

STC has a positive performance today by + 2.43 %, Al Rajhi Bank has a positive performance today by + 1.04 %

UAE

ETISALAT AD closed up today by + 0.56%, and act defensively with COVID19



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